

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

PROJECT TRACKING

USER GUIDE

**Project Tracking Team
February 1994**

**PROJECT TRACKING
USER GUIDE**

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INTRODUCTION

OVERVIEW

This User Guide was developed to assist School Districts, step-by-step, through the log on and retrieval of New Construction and Modernization project information for the Lease-Purchase Program. By utilizing this service, School Districts can avoid delay when inquiring for standard project questions. There is no charge from the Office of Public School Construction (OPSC) for use of this service by School Districts. Please note, forms are not available through this service.

PURPOSE

The Office of Public School Construction published the Project Tracking User Guide to assist you in understanding how to use the Project Tracking System (PTS). It will explain how to access the service, what to enter in the fields, and how to move from screen to screen. The PTS does not reflect every document necessary to process applications. Please contact your Project Manager for that information.

DESCRIPTION

The PTS provides general information about the School District, including its involvement with various programs administered by the State Allocation Board (SAB) and the status of each application in the process. The PTS is dynamic and growing. In its current form, a School District may query the system for general project information, the status of a project or the location of a project within the OPSC. Further innovations will allow the District to query status of key elements in the Leroy F. Greene Lease-Purchase Program. These elements will include, but will not be limited to, fund releases, bid approvals, phase approvals, plan reviews, change orders, close outs and any other information vital to our customers in tracking their active projects.

The methodology to access all project information is as follows:

1. Select a SchoolDistrict
2. Select a Lease-Purchase Program (New Construction or Modernization)
3. Select a specific project
4. Select the type of information you need (status or location)

NOTE: All team processes are not currently automated; therefore, some screens will not display location information for some teams. Historical information within the project location screens may also not be included. Current project phase information and all future information is available. For example, if a project has received a zero or actual apportionment prior to November 1994, the locations screens may not display the apportionment.

REQUESTING ACCESS

Please access the Public Access Information Request (Form SAB598 new 1/95) and send to:

Office of Public School Construction
Information Systems Team
501 J Street, Suite 400
Sacramento, CA 95814

Upon review and verification of the information contained on this form, the Information Systems Team will send you a letter with your login name and temporary password.

ACCESSING THE SERVICE

GETTING STARTED

You will need a computer with a modem and communication software for the modem. Your Information Systems Technicians or a person with some knowledge of computers should be able to assist with any of the hardware and software setup. The communication settings are:

PARAMETER	SETTING
Phone Number	(916) 322-4995
Baud Rate	9600 or 2400
Data Bits	8
Stop Bit	1
Parity	None
Duplex	Full
Flow Control	Xon/Xoff
Terminal Emulation	VT100

FOR INFORMATION OR ASSISTANCE ON THE REMOTE ACCESS SERVICE

If you would like more information about this service or need on-line assistance, please contact your Project Manager.

ACCESSING THE REMOTE ACCESS SERVICE

After setting up the computer and modem hardware and software, access the service by dialing the number (916) 322-4995. On your first login attempt, the computer will automatically prompt you for a new password. Follow the screen prompts to initialize your password. Passwords must be in lowercase, at least 6 characters in length and include one numeral. Please do not forget your password, we cannot retrieve it once forgotten. To maintain integrity, the service will automatically prompt you to change your password every 62 days. Because of the limited number of access lines, the service also includes an automatic log out utility. If you are idle (viewing any screen) for longer than 20 minutes, the service will automatically log you out. If this occurs, you will need to reset your computer and modem to login again.

During the normal access process, the following messages will appear:

DISPLAY	RESULT/ACTION
UNIX(r) System V Release 4.0 (Zeus) login:	In lowercase type the login name provided by the OPSC from your request for access. Press the “Enter” key.
Password:	In lowercase and with no space type your password. Press the “Enter” key.
PROJECT TRACKING menu bar	At this point, you will have successfully logged into the service and may begin your project inquiries.

BASIC KEY STROKES

There are a few basic key strokes that will be commonly used within the PTS. They include:

KEY STROKE	WHAT IT DOES
ESC	This key will initiate the search for information.
CONTROL + BACKSPACE ¹	The “Interrupt” process allows you to stop what you are doing before the command is executed letting you start over
TAB	This key will move you from field to field. If there are no fields to the right, then it will move you down to the next field.
ENTER	This key will perform the same as TAB.
UP ARROW	This key will move you to the prior field.
DOWN ARROW	This key will perform the same as TAB.
RIGHT ARROW	This key will let you move to the next space in the field and if there are no available spaces in the field, then it will move you to the first space in the next field.
LEFT ARROW	This key will let you move to the previous space in the field and if there are no available spaces in the field, then it will move you to the last space in the previous field.

MENU BAR COMMANDS

Use these commands instead of using the left or right arrow. Here are some examples:

KEY STROKE	WHAT IT DOES
Q	Query - This lets you choose another project number.
N	Next - This will give the next larger application number in the PM Log system. Example: from 01 project to 02 project or to 01 project of next School District in line.
P	Previous - This will give the prior smaller application number in the PM Log system. Example: from 02 project to 01 project or to 01 project of prior School District in line.
S	Select - The pop-up menu with selections will appear.
E	Exit - This will log you out of the PTS.

¹ CONTROL + ____ means that you must hold down the control key and press the corresponding key.

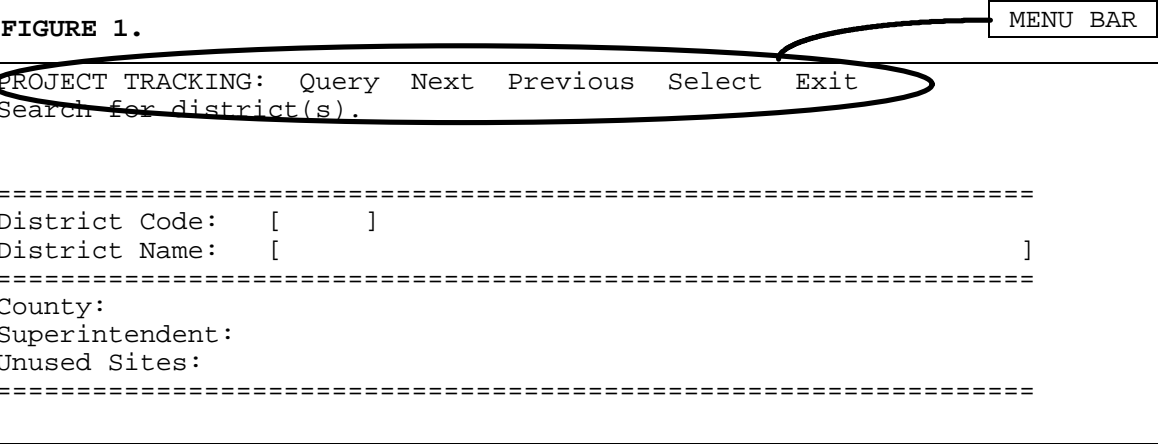
CHECKING A PROJECT’S GENERAL STATUS

OVERVIEW

This section provides the information necessary for accessing a project’s status.

THE SEARCH PROCESS

While using the PTS, you should have a display on the screen with a menu bar at the top (figure 1). A brief description of the highlighted menu command appears directly below the menu bar.



To select a District from the PTS:

STEP	PROCEDURE
1	Press the “Q” key or use the Right/ Left Arrow or Space Bar to highlight “Query” and press ENTER. Either of these actions places the cursor in the district code field. This should permit you to enter the School District identifier.
2	Enter the School District’s five digit CPSD number in the district code field.
3	Now press the ESC key. The District’s name, county, superintendent and number of unused sites appear directly below the district code field.

¹ CPSD: California Public School Directory

GENERAL PROJECT INFORMATION

To obtain more information for a specific project, complete the following steps:

STEP	PROCEDURE
1	Press the “S” key or use the Right/Left Arrow or Space Bar to highlight “Select” and press ENTER. This should result in a pop-up menu with a list of Lease-Purchase programs (figure 2).
2	Using the Right Arrow, place the cursor/highlight on the Lease-Purchase program you want more information from. Press the ESC key. The next screen is the Lease-Purchase program main screen and describes some of the general aspects of a project.
3	Press the “Q” key or use the Right Arrow to highlight “Query” and press ENTER. The cursor will proceed to the district HSAA attendance code field.
4	Enter the HSAA ¹ number or “00”, press ENTER and the cursor will proceed to the project number field.
5	Enter the 2 digit project number and press the ESC key.
6	The screen will then update with specific information about the specified project. If more detailed information is needed proceed to Step 7; otherwise, press the “E” key to exit.
7	Press the “S” key to display the 1st Status screen (figure 3a). Press ENTER to display the second Status screen (figure 3b). Press ENTER again to return to the first screen. Press the “E” key to return to the previous menu.

FIGURE 2.

```

PROJECT TRACKING:  Query Next Previous Select Exit
Select current district for further examination.
=====
District Code:    [61119]
District Name:    [ALAMEDA CITY UNIFIED                ]
=====
+-----+
| Press [ESC] to Select | Interrupt to Exit | Arrow key to Move |
+-----+-----+-----+
| Program                | Count             | Representative      |
+-----+-----+-----+
| L-P/Growth              | 1                 | John               | Doe
| L-P/Modernization       | 1                 | John               | Doe
| Deferred Maintenance    | 1                 | Mary               | Smith
| Asbestos Abatement     | 1                 | Mary               | Smith
| Portable Buildings      | 1                 | Mary               | Smith
+-----+-----+-----+
+-----+

```

POP-UP MENU

¹ HSAA: High School Attendance Area

FIGURE 3A.

STATUS: Screen Exit
View the next screen.

=====

NEW CONSTRUCTION - STATUSScreen 1 of 2

22-61119-00-01 ALAMEDA CITY UNIFIED ALAMEDA
Site Name: AMELIA EARHART

----- SAB APPROVALS -----

Phase 1:
Site Acq.:
Phase 2:
Phase 3:

Bid: 09/30/87 1.00 Not Appl. Not Applicable
Change Order: Not Appl. Not Applicable
Close Out:
Pending SAB Approval:

=====

FIGURE 3B.

Press <Enter> to continue...
View the next screen.

=====

NEW CONSTRUCTION - STATUSScreen 2 of 2

22-61119-00-01 ALAMEDA CITY UNIFIED ALAMEDA
Site Name: AMELIA EARHART

Project Mgt Received: 12/05/86 ADA Assigned: 119 Pupils
Site Acres: 0.00 Total Area: 6,545 Square Feet
Portable Area: 0 Square Feet

--- HOLD SOURCES --- --- STATUS --- --- AUDIT ---
Accounting Unit: 50/50: Auditor:
Audits Unit: Match District: 100% Expenditure
Match Unit : Fasttrack: Received:
Special Section: Upfront Bond:
Field Section: Paired Project:
Interim:
Fiscal Mgr:

=====

CHECKING A PROJECT’S LOCATION

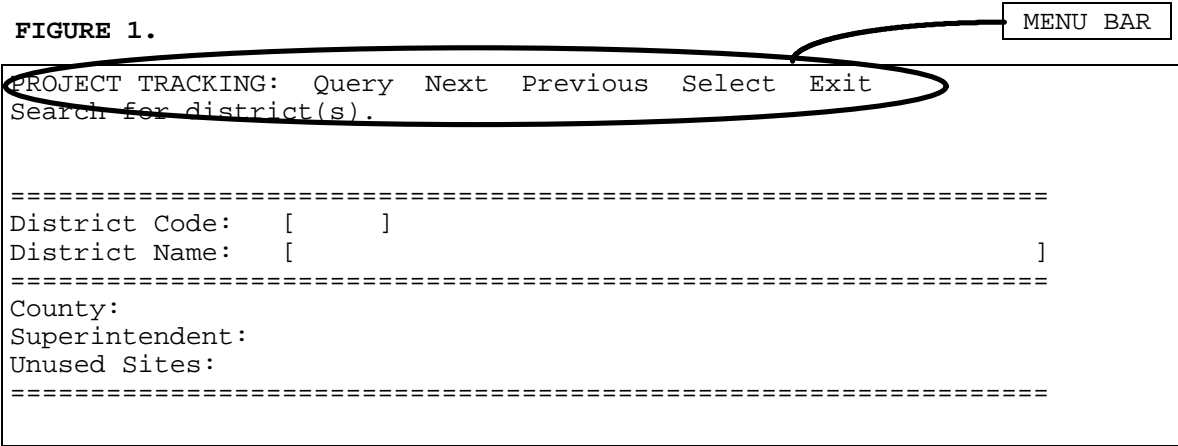
OVERVIEW

This section provides the information necessary for accessing a project’s status.

THE SEARCH PROCESS

While using the PTS, you should have a display on the screen with a menu bar at the top (figure 1). A brief description of the highlighted menu command appears directly below the menu bar.

FIGURE 1.



To select a District from the PTS:

STEP	PROCEDURE
1	Press the “Q” key or use the Right/ Left Arrow or Space Bar to highlight “Query” and press ENTER. Either of these actions places the cursor in the district code field. This should permit you to enter the School District identifier.
2	Enter the School District’s five digit CPSD number in the district code field.
3	Now press the ESC key. The District’s name, county, superintendent and number of unused sites appear directly below the district code field.

¹ CPSD: California Public School Directory

PROJECT LOCATION INFORMATION

To obtain more information for a specific project, complete the following steps:

Step	Procedure
1	Press the “S” key or use the Right/Left Arrow or Space Bar to highlight “Select” and press ENTER. This should result in a pop-up menu with a list of Lease-Purchase programs (figure 2).
2	Using the Right Arrow, place the cursor/highlight on the Lease-Purchase program you want more information from. Press the ESC key. The next screen is the Lease-Purchase program main screen and describes some of the general aspects of a project.
3	Press the “Q” key or use the Right Arrow to highlight “Query” and press ENTER. The cursor will proceed to the district HSAA attendance code field.
4	Enter the HSAA ¹ number or “00”, press ENTER and the cursor will proceed to the project number field.
5	Enter the 2 digit project number and press the ESC key.
6	The screen will then update with specific information about the specified project. If more detailed information is needed proceed to Step 7; otherwise, press the “E” key to exit.
7	Press the “L” key to display the first project location screen (figure 4a). Press ENTER to move through the screens (figure 4b) and return to first screen. Press “E” to exit to the menu bar.

FIGURE 2.

```

PROJECT TRACKING:  Query Next Previous Select Exit
Select current district for further examination.
=====
District Code:    [61119]
District Name:    [ALAMEDA CITY UNIFIED]
=====
+-----+
| Press [ESC] to Select | Interrupt to Exit | Arrow key to Move |
+-----+-----+-----+
| Program                | Count             | Representative      |
+-----+-----+-----+
| L-P/Growth             | 1                 | John               | Doe
| L-P/Modernization      | 1                 | John               | Doe
| Deferred Maintenance   | 1                 | Mary               | Smith
| Asbestos Abatement     | 1                 | Mary               | Smith
| Portable Buildings     | 1                 | Mary               | Smith
+-----+-----+-----+

```

POP-UP MENU

¹ HSAA: High School Attendance Area

FIGURE 4A.

LOCATION: Next screen Exit
View the next screen.

=====

NEW CONSTRUCTION - LOCATION

Screen 1 of 6

Project: 22-61119-00-01 District: ALAMEDA CITY UNIFIED

----- Phase 1 ----- ----- Phase S -----

TEAM	STATUS	TEAM	STATUS
Project Mgt	In: 12/05/86	Project Mgt	In:
	Out:		Out:
Accounting		Real Estate	
Agenda		Project Mgt	In:
Project Mgt	In:		Out:
	Out:	Accounting	Pend. Approval:
Eligibility	Priority: 8	Agenda	Scheduled SAB:
Project Mgt	In:	Accounting	SAB Approval:
	Out:	Project Mgt	In:
Accounting	Pend. Approval:		Out:
Agenda	Scheduled SAB:	Accounting	Release Recvd:
Accounting	SAB Approval:		Sent to SCO:

(Continued on next page)

FIGURE 4B.

Press <Enter> to continue...
View the next screen.

=====

NEW CONSTRUCTION - LOCATION

Screen 2 of 6

Project: 22-61119-00-01 District: ALAMEDA CITY UNIFIED

----- Phase 1 (cont) ----- ----- Phase S (cont) -----

TEAM	STATUS	TEAM	STATUS
Project Mgt	In:	Project Mgt	Out:
	Out:		
Accounting	Release Recvd:		(End of Phase S)
	Sent to SCO:		
Project Mgt	Out:		

(End of Phase 1)

=====

Helpful Hint:
The “In” dates are displayed when all the relevant documents are received and accepted for a particular process. The “Out” dates are displayed when all the relevant documents are processed and submitted to the next team. For example, if no “In” date is displayed, some documents have not been submitted or are not acceptable. If an “In” date is displayed and there is no “Out” date, the team is currently processing the project. If an “Out” date is displayed, the team has completed processing the project and has submitted it to the next team.

FIGURE 4B (CONTINUED).

Press <Enter> to continue...
View the next screen.

NEW CONSTRUCTION - LOCATION

Screen 3 of 6

Project: 22-61119-00-01

District: ALAMEDA CITY UNIFIED

----- Phase 2 -----

----- Phase 3 -----

TEAM	STATUS	TEAM	STATUS
Project Mgt	In:	Project Mgt	In:
	Out:		Out:
Accounting	Pend. Approval:	Proj Allow	
Agenda	Scheduled SAB:	Project Mgt	In:
Accounting	SAB Approval:		Out:
Project Mgt	In:	Accounting	Pend. Approval:
	Out:	Agenda	Scheduled SAB:
Accounting	Release Recvd:	Accounting	SAB Approval:
	Sent to SCO:	Project Mgt	Out:
Project Mgt	Out:		

(End of Phase 2)

(End of Phase 3)

Press <Enter> to continue...
View the next screen.

NEW CONSTRUCTION - LOCATION

Screen 4 of 6

Project: 22-61119-00-01

District: ALAMEDA CITY UNIFIED

----- Bid Approval -----

----- Change Order -----

TEAM	STATUS	TEAM	STATUS
Project Mgt	In:	Proj Constr	
	Out:	Accounting	Pend. Approval:
Bid Approvl		Agenda	Scheduled SAB:
Proj Allow		Accounting	SAB Approval:
Bid Approvl		Proj Constr	
Accounting	Pend. Approval:	Accounting	Release Recvd:
Agenda	Scheduled SAB:		Sent to SCO:
Accounting	SAB Approval: 09/30/87	Proj Constr	
Project Mgt	In:		
	Out:		

(Continued on next page)

(End of Change Order Phase)

Helpful Hint:
The “In” dates are displayed when all the relevant documents are received and accepted for a particular process. The “Out” dates are displayed when all the relevant documents are processed and submitted to the next team. For example, if no “In” date is displayed, some documents have not been submitted or are not acceptable. If an “In” date is displayed and there is no “Out” date, the team is currently processing the project. If an “Out” date is displayed, the team has completed processing the project and has submitted it to the next team.

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FIGURE 4B (CONTINUED).

Press <Enter> to continue...
View the next screen.

NEW CONSTRUCTION - LOCATION

Screen 5 of 6

Project: 22-61119-00-01 District: ALAMEDA CITY UNIFIED

Bid (cont.)

TEAM STATUS

Accounting Release Recvd:
Sent to SCO:
Project Mgt Out:

(End of Bid Phase)

Deferred Items (219)

Project Mgt In:
Out:
Bid Approvl
Accounting Release Recvd:
Sent to SCO:
Project Mgt Out:

(End of Deferred Items Phase)

Press <Enter> to continue...
View the next screen.

NEW CONSTRUCTION - LOCATION

Screen 6 of 6

Project: 22-61119-00-01 District: ALAMEDA CITY UNIFIED

Audit / Close-out

TEAM STATUS

Audit a. 100% Documents Recvd:
b. Assigned:
c. Auditor:
Accounting Pending Approval:
Agenda Scheduled SAB:
Accounting SAB Approval:
Audit Journal to Acct:
Accounting Release Recvd:
Sent to SCO:
Audit Board Item:
Journal to Agenda: 07/28/93
Fileroom Sent to Archives: N

Helpful Hint:
The “In” dates are displayed when all the relevant documents are received and accepted for a particular process. The “Out” dates are displayed when all the relevant documents are processed and submitted to the next team. For example, if no “In” date is displayed, some documents have not been submitted or are not acceptable. If an “In” date is displayed and there is no “Out” date, the team is currently processing the project. If an “Out” date is displayed, the team has completed processing the project and has submitted it to the next team.

CHECKING A PROJECT’S FUNDING STATUS

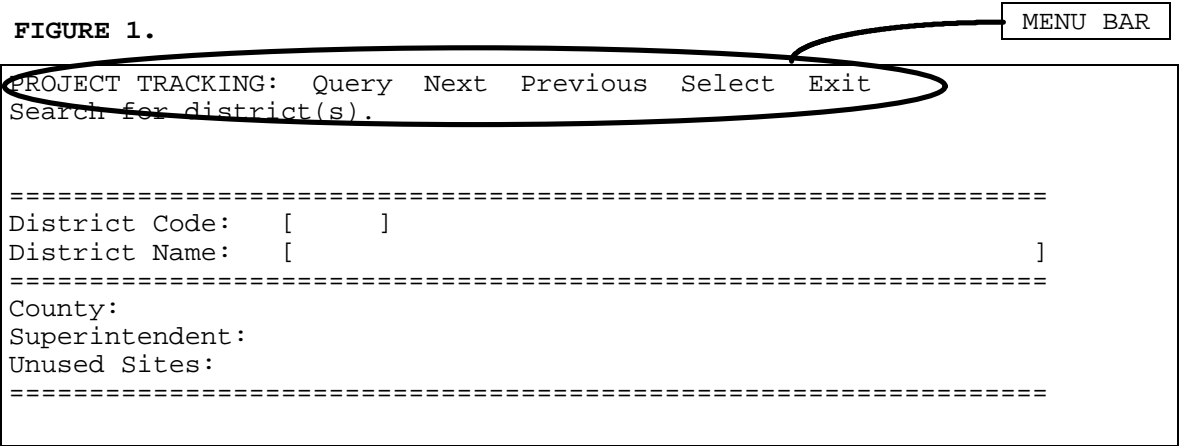
OVERVIEW

This section provides the information necessary for accessing a project’s funding status and date sent to the State Controller’s Office.

THE SEARCH PROCESS

While using the PTS, you should have a display on the screen with a menu bar at the top (figure 1). A brief description of the highlighted menu command appears directly below the menu bar.

FIGURE 1.



To select a District from the PTS:

STEP	PROCEDURE
1	Press the “Q” key or use the Right/ Left Arrow or Space Bar to highlight “Query” and press ENTER. Either of these actions places the cursor in the district code field. This should permit you to enter the School District identifier.
2	Enter the School District’s five digit CPSD number in the district code field.
3	Now press the ESC key. The District’s name, county, superintendent and number of unused sites appear directly below the district code field.

¹ CPSD: California Public School Directory

GENERAL PROGRAM INFORMATION

To obtain more information for a specific project, complete the following steps:

STEP	PROCEDURE
1	Press the “S” key or use the Right/Left Arrow or Space Bar to highlight “Select” and press ENTER. This should result in a pop-up menu with a list of Lease-Purchase programs (figure 2).
2	Using the Right Arrow, place the cursor/highlight on the Lease-Purchase program you want more information from. Press the ESC key. The next screen is the Lease-Purchase program main screen and describes some of the general aspects of a project.
3	Press the “Q” key or use the Right Arrow to highlight “Query” and press ENTER. The cursor will proceed to the district HSAA attendance code field.
4	Enter the HSAA ¹ number or “00”, press ENTER and the cursor will proceed to the project number field.
5	Enter the 2 digit project number and press the ESC key.
6	The screen will then update with specific information about the specified project. If more detailed information is needed, proceed to Step 7; otherwise, press the “E” key to exit.
7	If you are searching for the amount of a fund release, go to step 8. If you are searching the date of a fund release, go to step 9.
8	Press the “S” key to display the 1st Status screen (figure 3a). This screen will display the amounts released for each phase. Press ENTER to display the second Status screen (figure 3b). Press ENTER again to return to the first screen. Press the “E” key to return to the previous menu.
9	Press the “L” key to display the first project location screen (figure 4a). Under each action, the last Accounting team designation will show the “Release Recvd” and “Sent to SCO” dates. Press ENTER to move through the screens (figure 4b) and return to first screen. Press “E” to exit to the menu bar.

¹ HSAA: High School Attendance Area

FIGURE 2.

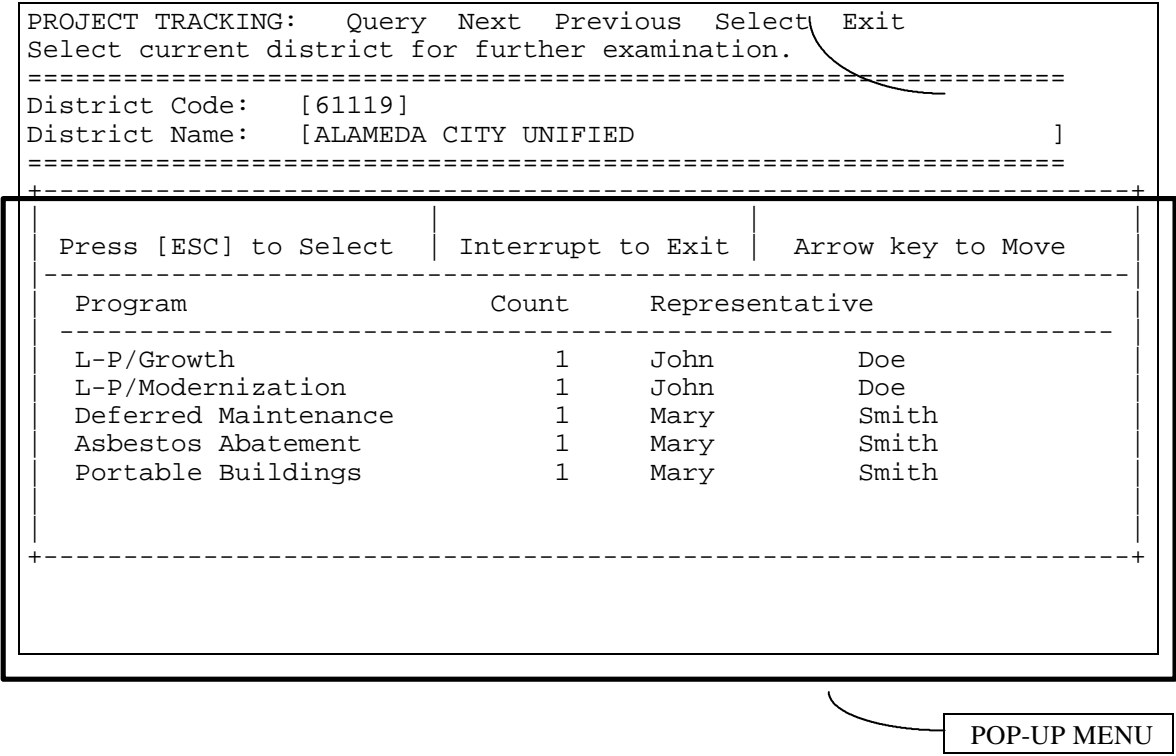


FIGURE 3A.

STATUS: Screen Exit
View the next screen.

=====

NEW CONSTRUCTION - STATUSScreen 1 of 2

22-61119-00-01 ALAMEDA CITY UNIFIED ALAMEDA
Site Name: AMELIA EARHART

----- SAB APPROVALS -----

Phase 1:
Site Acq.:
Phase 2:
Phase 3:

Bid: 09/30/87 1.00 Not Appl. Not Applicable
Change Order: Not Appl. Not Applicable
Close Out:
Pending SAB Approval:

=====

FIGURE 3B.

Press <Enter> to continue...
View the next screen.

=====

NEW CONSTRUCTION - STATUSScreen 2 of 2

22-61119-00-01 ALAMEDA CITY UNIFIED ALAMEDA
Site Name: AMELIA EARHART

Project Mgr. Received: 12/05/86 ADA Assigned: 119 Pupils
Site Acres: 0.00 Total Area: 6,545 Square Feet
Portable Area: 0 Square Feet

--- HOLD SOURCES --- --- STATUS --- --- AUDIT ---
Accounting Unit: 50/50: Auditor:
Audits Unit: Match District: 100% Expenditure
Match Unit : Fasttrack: Received:
Special Section: Upfront Bond:
Field Section: Paired Project:
Interim:
Fiscal Mgr:

=====

CHECKING A PROJECT’S SCHEDULED SAB PRESENTATION

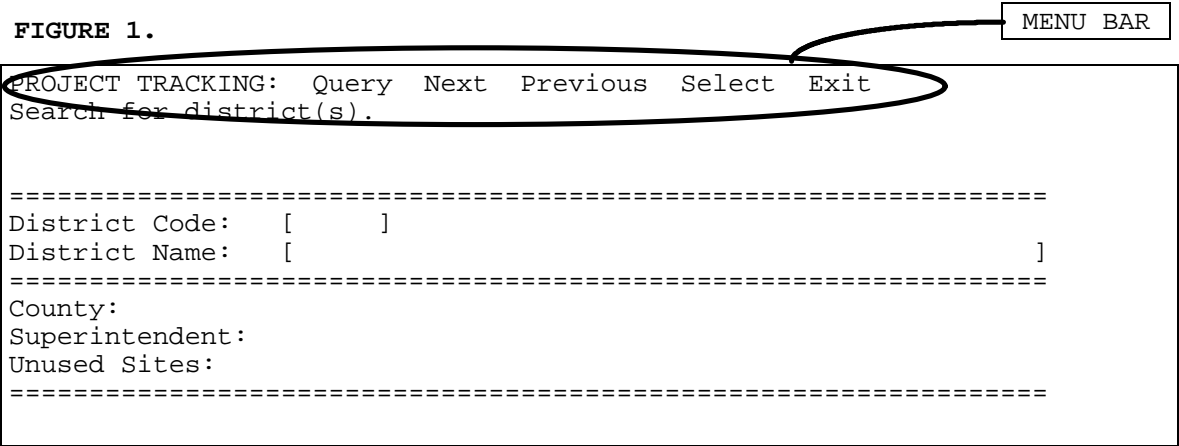
OVERVIEW

This section provides the information necessary to determine when your project will be presented at the SAB meeting for approval.

THE SEARCH PROCESS

While using the PTS, you should have a display on the screen with a menu bar at the top (figure 1). A brief description of the highlighted menu command appears directly below the menu bar.

FIGURE 1.



To select a District from the PTS:

STEP	PROCEDURE
1	Press the “Q” key or use the Right/ Left Arrow or Space Bar to highlight “Query” and press ENTER. Either of these actions places the cursor in the district code field. This should permit you to enter the School District identifier.
2	Enter the School District’s five digit CPSD number in the district code field.
3	Now press the ESC key. The District’s name, county, superintendent and number of unused sites appear directly below the district code field.

² CPSD: California Public School Directory

PROJECT SAB APPROVAL INFORMATION

To obtain more information for a specific project, complete the following steps:

STEP	PROCEDURE
1	Press the “S” key or use the Right/Left Arrow or Space Bar to highlight “Select” and press ENTER. This should result in a pop-up menu with a list of Lease-Purchase programs (figure 2).
2	Using the Right Arrow, place the cursor/highlight on the Lease-Purchase program you want more information from. Press the ESC key. The next screen is the Lease-Purchase program main screen and describes some of the general aspects of a project.
3	Press the “Q” key or use the Right Arrow to highlight “Query” and press ENTER. The cursor will proceed to the district HSAA attendance code field.
4	Enter the HSAA ¹ number or “00”, press ENTER and the cursor will proceed to the project number field.
5	Enter the 2 digit project number and press the ESC key.
6	The screen will then update with specific information about the specified project. If more detailed information is needed proceed to Step 7; otherwise, press the “E” key to exit.
7	Press the “S” key to display the 1st Status screen (figure 3a). The pending SA approval field contains the date your project will be presented to the SAB and the total dollar amount. Press the “E” key to return to the previous menu.

FIGURE 2.

```

PROJECT TRACKING:  Query Next Previous Select Exit
Select current district for further examination.
=====
District Code:    [61119]
District Name:    [ALAMEDA CITY UNIFIED                ]
=====
+-----+
| Press [ESC] to Select | Interrupt to Exit | Arrow key to Move |
+-----+-----+-----+
| Program                | Count            | Representative      |
+-----+-----+-----+
| L-P/Growth             | 1                | John               | Doe
| L-P/Modernization      | 1                | John               | Doe
| Deferred Maintenance    | 1                | Mary               | Smith
| Asbestos Abatement     | 1                | Mary               | Smith
| Portable Buildings     | 1                | Mary               | Smith
+-----+-----+-----+
+-----+

```

POP-UP MENU

¹ HSAA: High School Attendance Area

FIGURE 3A.

STATUS: Screen Exit

View the next screen.

=====

NEW CONSTRUCTION - STATUS

Screen 1 of 2

22-61119-00-01

ALAMEDA CITY UNIFIED

ALAMEDA

Site Name:

AMELIA EARHART

----- SAB APPROVALS -----

----- RELEASES -----

Phase 1:

Site Acq.:

Phase 2:

Phase 3:

Bid:

09/30/87

1.00

Not Appl.

Not Applicable

Change Order:

Not Appl.

Not Applicable

Close Out:

Pending SAB Approval:

=====

EXITING THE PROJECT TRACKING SYSTEM

EXIT

The process that follows in the table below is based on the assumption that you are already in the PTS. To exit PTS, complete the following steps:

STEP	PROCEDURE
1	Press the “E” key at each menu bar until you exit the PTS.

ACCESS ANOTHER PROJECT

The process that follows in the table below is based on the assumption that you are already in PTS Status/Location menu bar. To access another project, complete the following steps:

STEP	PROCEDURE
1	Press the “E” key to exit to the Project Tracking menu bar and proceed to the appropriate section.

GLOSSARY

1. ADA assigned An acronym for the term “average daily attendance” (ADA) which are pupils to be housed in the teaching stations proposed for construction or modernization.
2. Applicable Change Order The approvable change or alteration to the project which is already under construction.
3. Bid: The complete and signed proposal to perform the work proposed for the sum stipulated.
4. Close-Out The final audit of the project where the actual project expenditures are reconciled with the authorized project costs.
5. Deferred Items Refers to construction items that are excluded from a construction contract and are to be performed at a later date.
6. District Code The five-digit numeral assigned to the particular School District in the California Public School Directory.
7. Est. Total Cost Estimated cost of the proposed project by the architect.
8. Expenditure received Refers to the School District’s submittal of the SAB 184- Detailed Listing of Warrants Issued by the District and summarized on the SAB 184- Summary of Expenditures and Construction Progress once the expenditures for the project have been incurred.
9. Fasttrack: Refers to a growth application where the project receives its project apportionment at Phase I with the stipulation that construction on the project be started within 18 months of SAB approval.
10. Fifty/ Fifty (50/ 50) Contribution Refers to the amount which the School District will contribute towards its share of the project’s cost.
11. Funding Priority. Refers to the eight possible funding levels Priority #1 being the highest possible.
12. Grade Levels The make-up of pupils at a particular school (i.e. K-6, 7-8, 9-12).
13. Interim: Refers to interim financing where a School District secures a commercial loan to finance the proposed project when State School construction funds are not available.
14. Local Match: Refers to the local match share requirement for the Match Period. The Match Period is the period in which local funds must be deposited in the school building account in an amount commensurate with the amount of new residential and commercial construction in the School District.
15. Paired Project: A project that is fully or partially funded by the School District ahead of State funding that is linked to another project that will be funded by the State for the extra portion funded by the School District on the initial project.
16. Pending SAB approval Refers to the next phase of the project requiring presentation to the State Allocation Board for approval and funding apportionment.

17. Phase 1: The initial approval of the project by the State Allocation Board commonly referred to as “Feasibility Studies” where funds are allocated to allow the School District to perform initial project planning and other specified activities.
18. Phase 2: Commonly referred to as the ‘Planning and Design’ phase where funds are allocated for the preparation of construction drawings and specifications.
19. Phase 3: Commonly referred to as a “Construction Apportionment”, it is where the State Allocation Board approves the funds required for the actual construction of the project.
20. Region: Refers to either the North, Central, or South portion of the State.
21. Release Recvd: Refers to the date when the SAB 237 - Fund Release Clearance was received by the Accounting Team from the Project Manager.
22. SCO: Acronym for the State Controller’s Office which issues the warrant for authorized project costs to the School District’s county treasurer’s office.
23. Sent to SCO: Refers to the date when the SAB 521 - Fund Release was sent from the Accounting Unit to the State Controller’s Office.
24. Site acq: Site acquisition for the acreage required for the proposed new school or addition to an existing school commonly referred to “Phase S”.
25. Site: The first bracket contains the site identification number which is the five-digit numeral assigned in the California Public School Directory and the second bracket contains the name of the school site.
26. Square feet: The actual square footage of the project proposed.
27. Superintendent: Refers to the School District Superintendent who is the primary contact for the District and usually one of the persons named on the SAB 508 as an authorized signatory.
28. Total Area: Refers to maximum building area which an applicant School District can construct or modernize.
29. Upfront Bond: A streamlined sale of the general obligation bond process that was designed to mitigate arbitrage interest penalties.